

NEIGHBORHOOD OPPORTUNITY ASSESSMENT

INNOVATION VILLAGE



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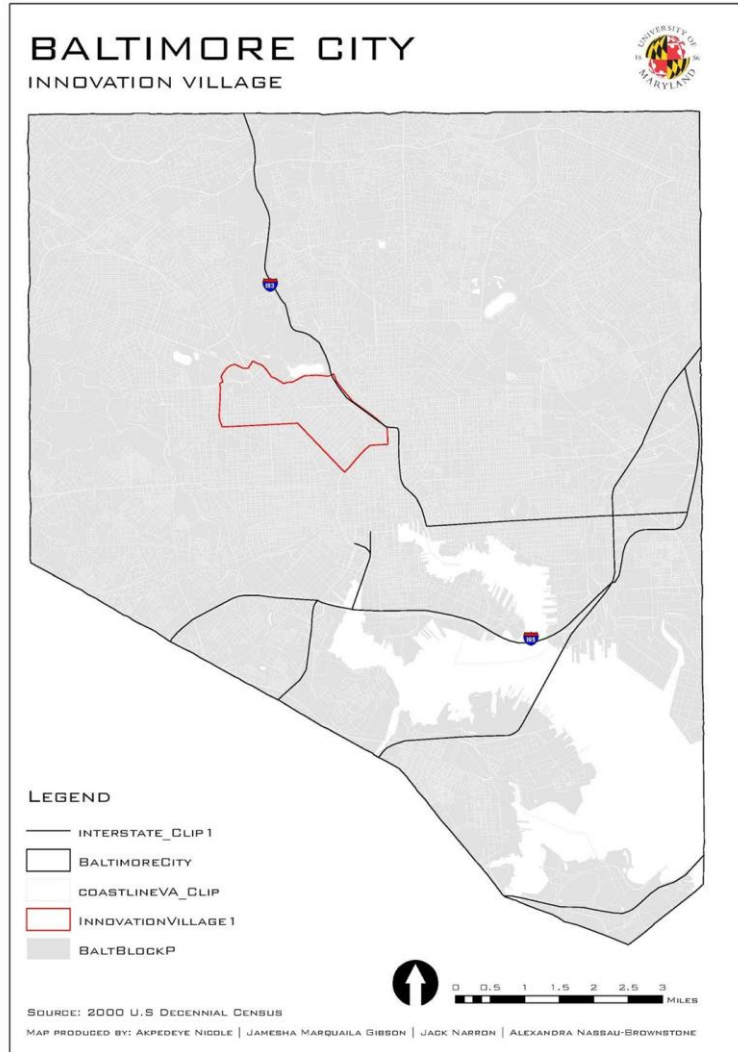
Innovation Village

The first Innovation District in Baltimore

The mission of the Innovation Village is to

“strength[en] Central West Baltimore economically through entrepreneurship, innovation and inclusive growth for all.”

Over 50 partners including:
anchor institutions,
community based organizations,
companies, and
national organizations



Mount Royal Community Development Corporation

Seeks to better understand the current socioeconomic conditions of the neighborhood by creating an inventory of neighborhood data

Evaluate spatial relationships between the data to determine some of the underlying factors contributing to:

Poverty

Neighborhood blight

Crime



Research Questions

1. Where do we see concentrations of key populations (members of the workforce, millennials, and more educated households) within Innovation Village?
1. Are there higher rates of homeownership vs. renters within Innovation Village?
1. Where do we see the highest concentrations of poverty and crime within Innovation Village?
1. What are the spending habits of residents within Innovation Village?
1. Are there potential locations of opportunity/challenges where additional educational, safety, or other types of investment or intervention may help to stabilize the community?

Variables Examined

Age (with a focus on working-age adults and millennials)

Educational Attainment

Housing Ownership & Vacancies

Crime

Poverty Rate

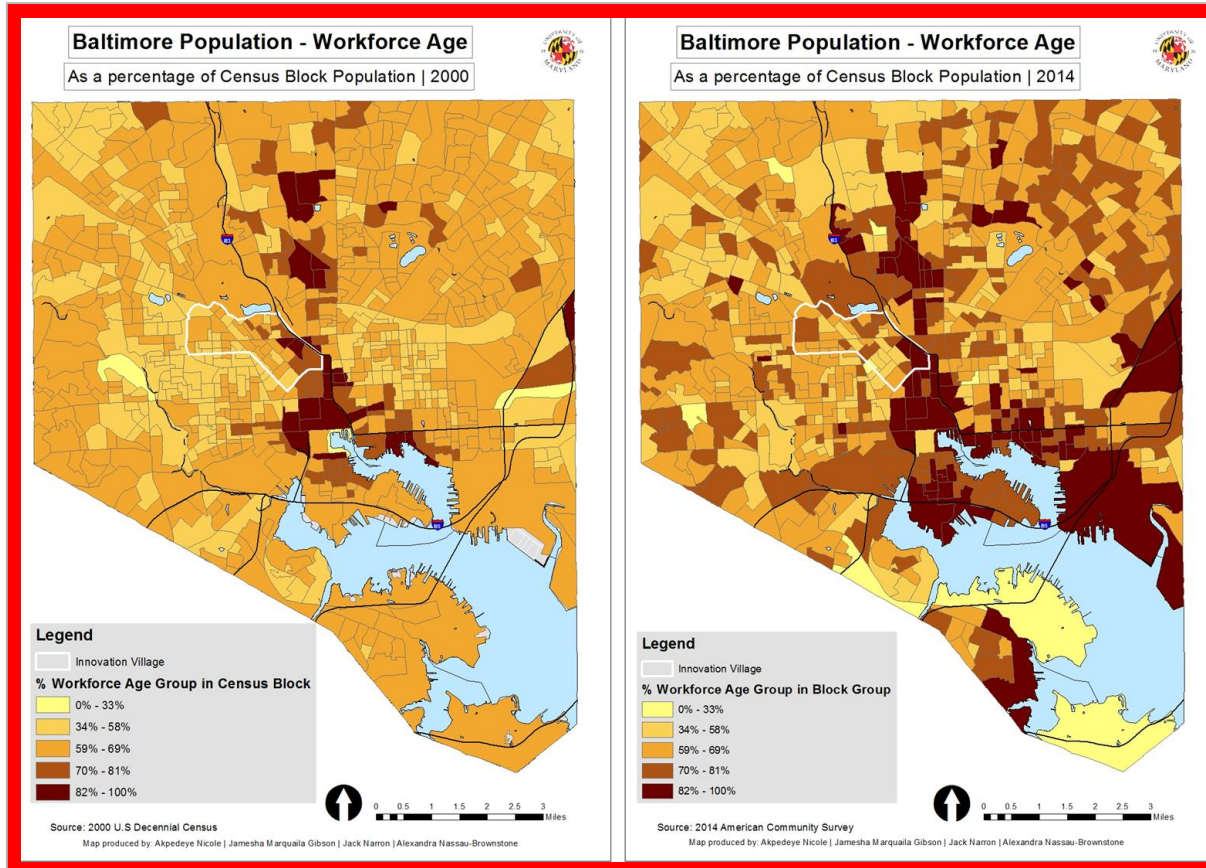
Household Spending Habits

Existing services and amenities

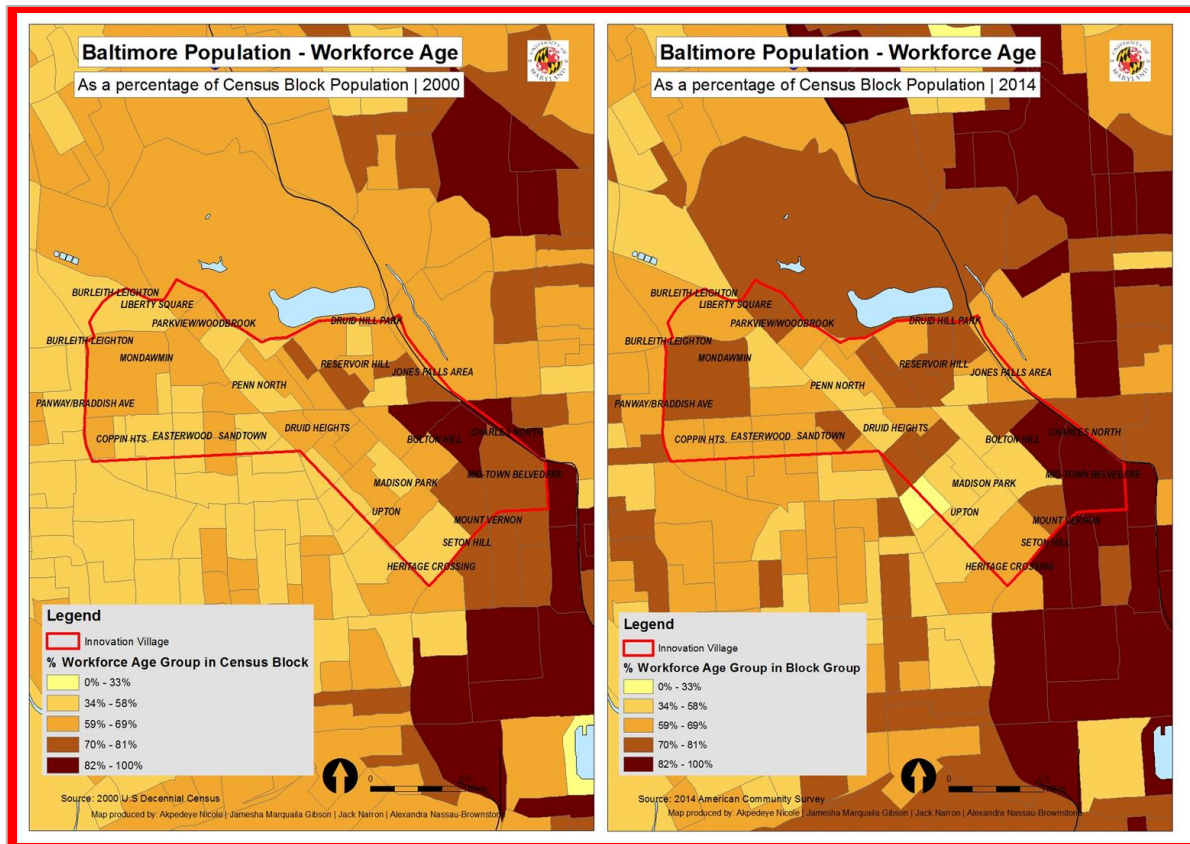
Methodology

1. Download raw data from the 2000 Census and ACS 2014 5 year Estimates for the city of Baltimore (Including Innovation Village), as well as Baltimore Open City data.
1. Reorganized data using Microsoft Excel.
1. Created color gradient maps and heatmaps of the data using ArcGIS. .
1. Calculated Z-scores of the variables and created a Neighborhood Assessment Index map for Baltimore City and Innovation Village using ArcGIS.
1. Determined spending habits, market profile, businesses, and major shopping centers in the Innovation Village using ArcGIS Online.

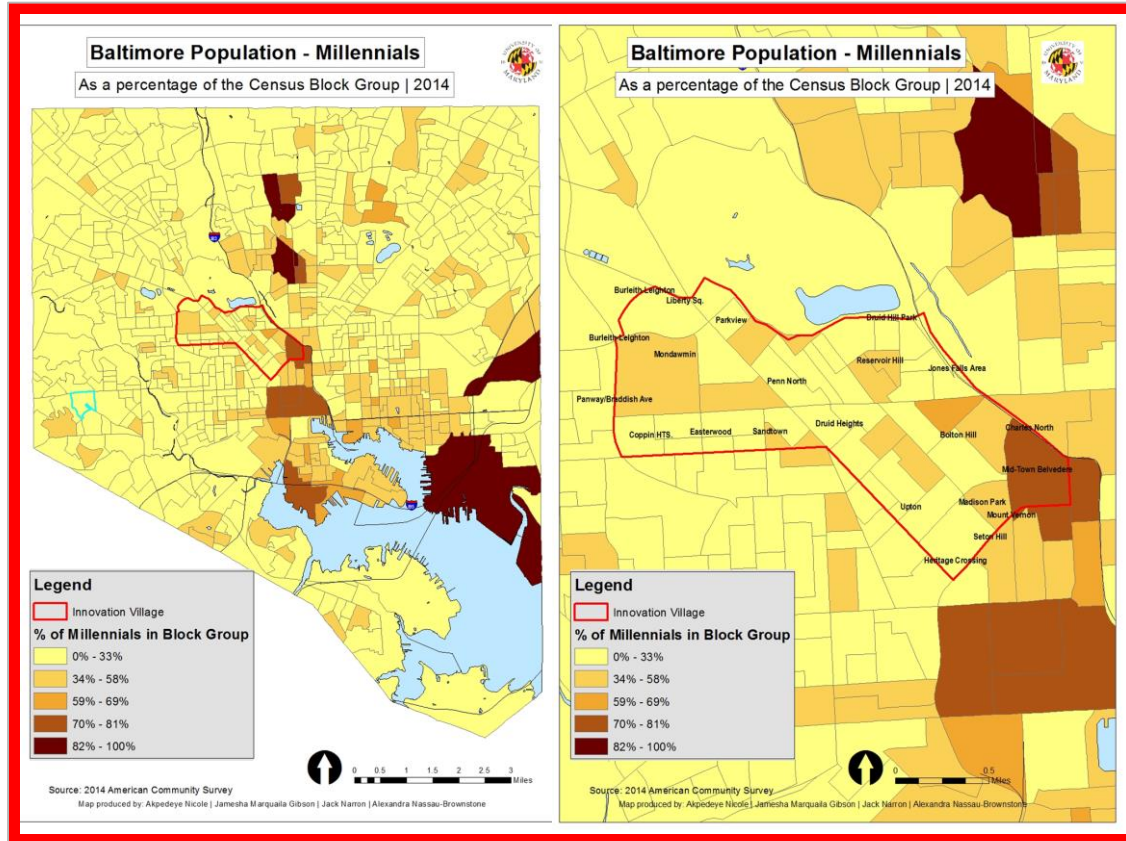
Percentage of Workforce Age Population -- Baltimore



% of Workforce Age Population -- Innovation Village



Percentage of Millennial Age Population



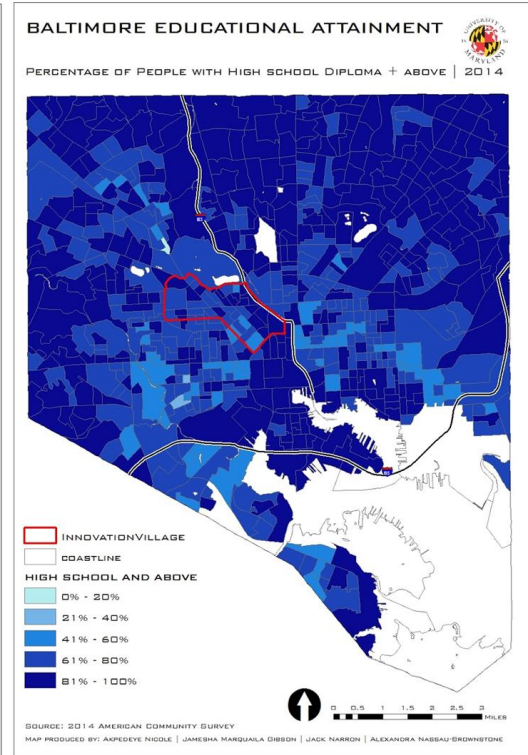
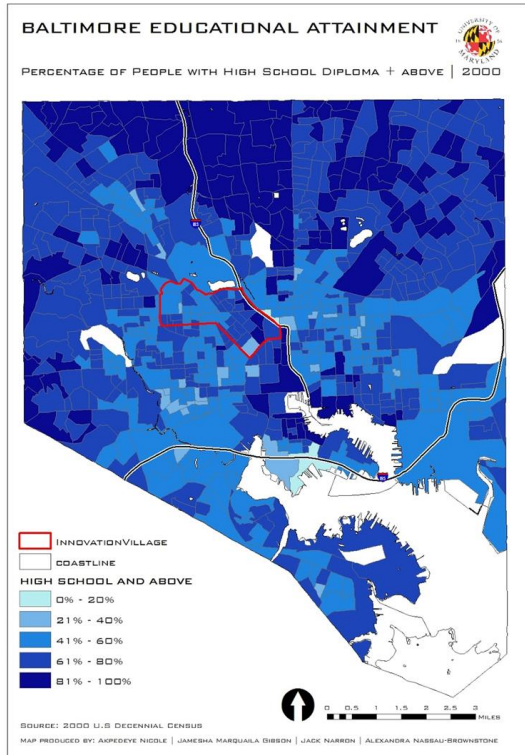
Age: Takeaways

From 2000 - 2014 -- significant increase in workforce age (*defined as 18-64*) population surrounding Inner Harbor, Canton, near Universities, and employment and art/entertainment centers.

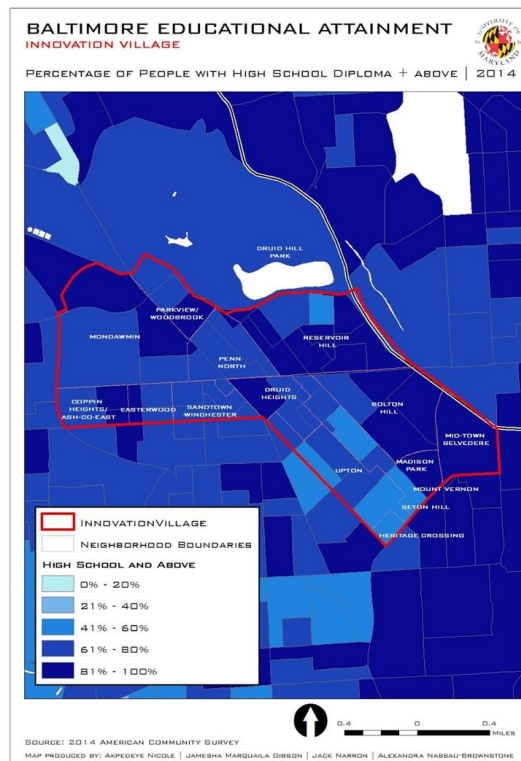
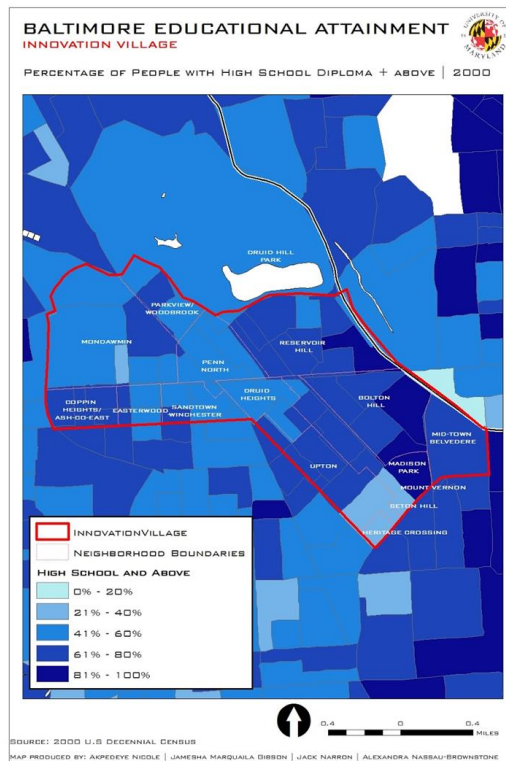
Millennials are clustered around Universities (UMD Baltimore, MICA, Coppin State University, Baltimore Community College, Morgan State, Notre Dame of Maryland University)

Within Innovation Village, the concentrations of workforce age and Millennials follow a similar pattern -- near Bolton Hill, Mount Vernon, Mondawmin

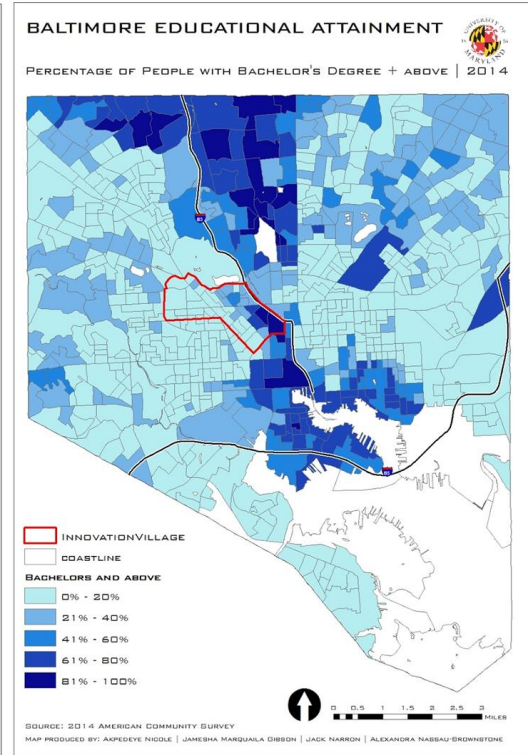
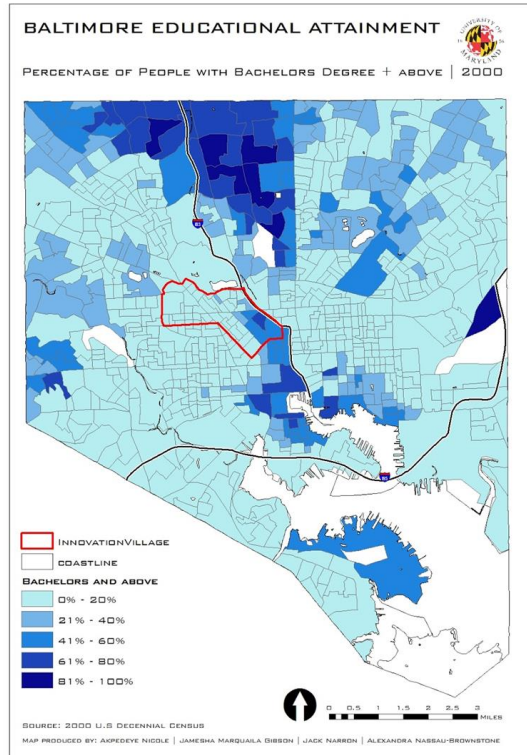
Educational Attainment: % with High School Diploma +



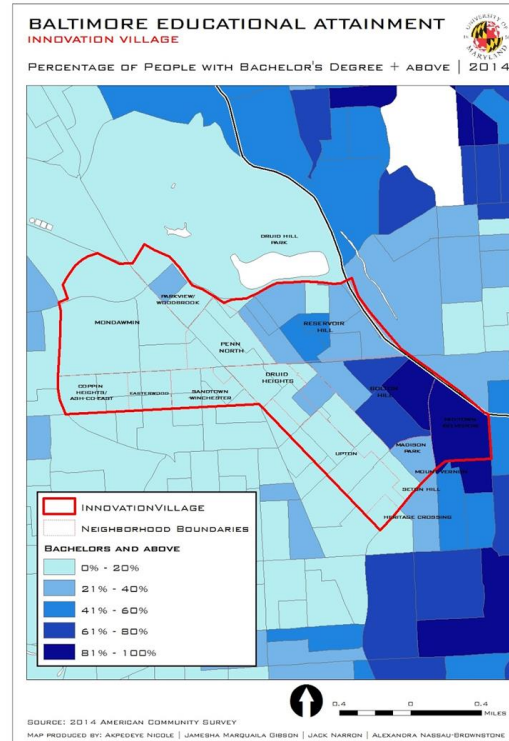
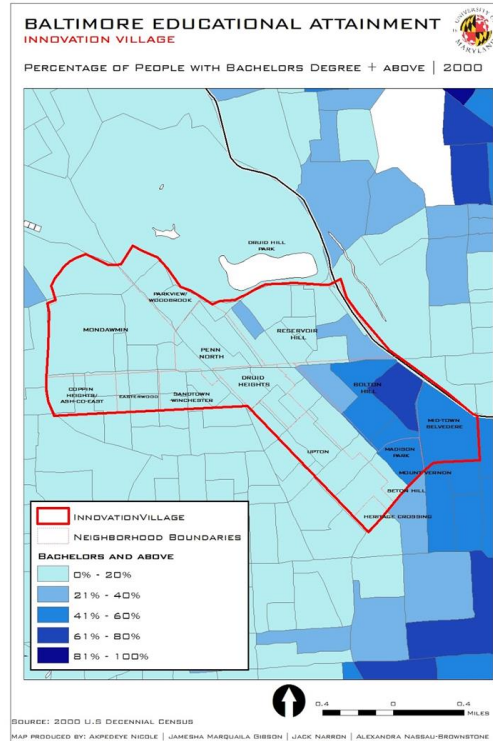
Educational Attainment: % with High School Diploma +



Educational Attainment: Bachelor's Degree +



Educational Attainment: Bachelor's Degree +

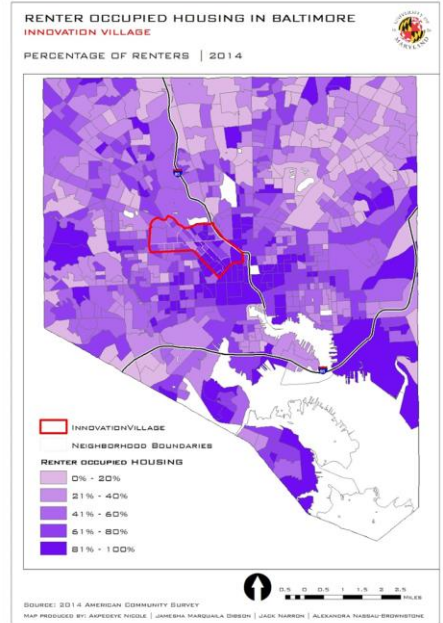
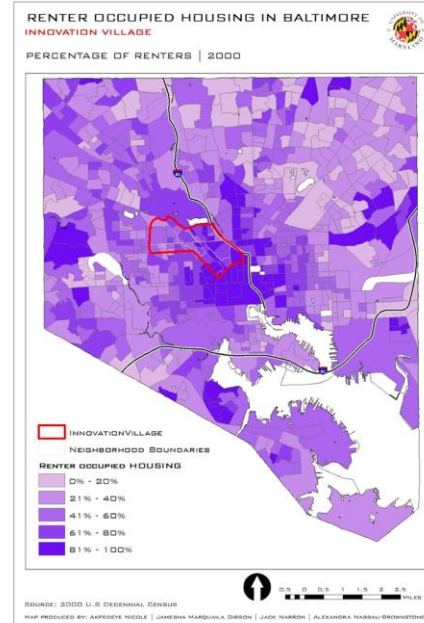
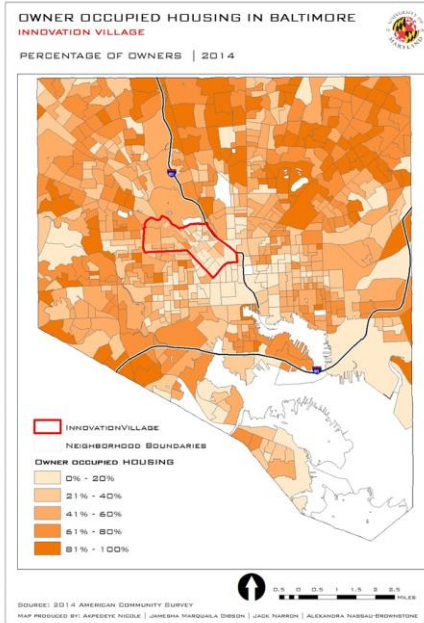
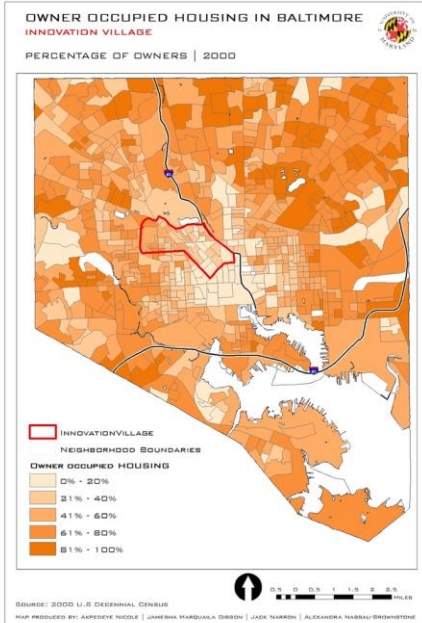


Educational Attainment: Takeaways

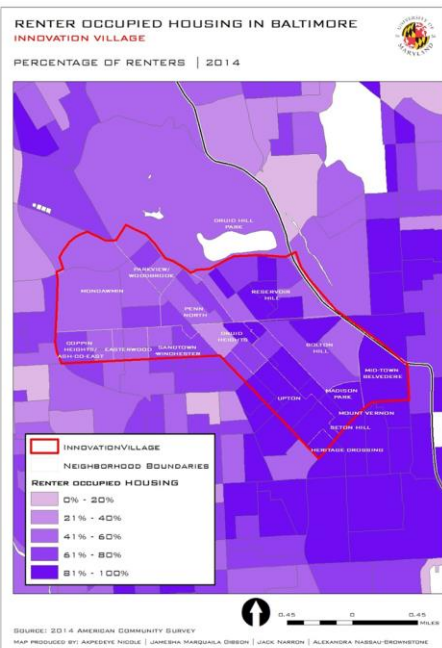
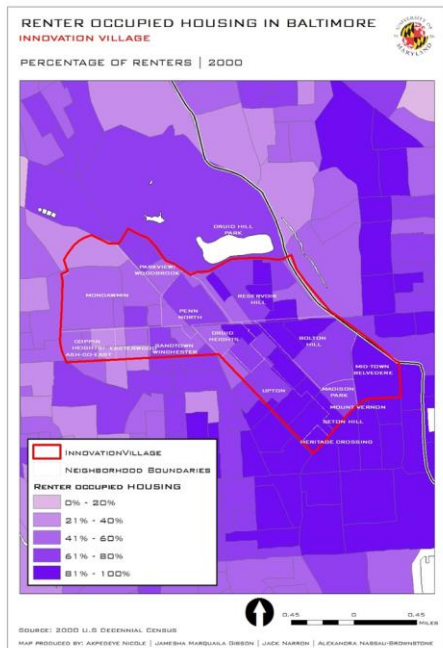
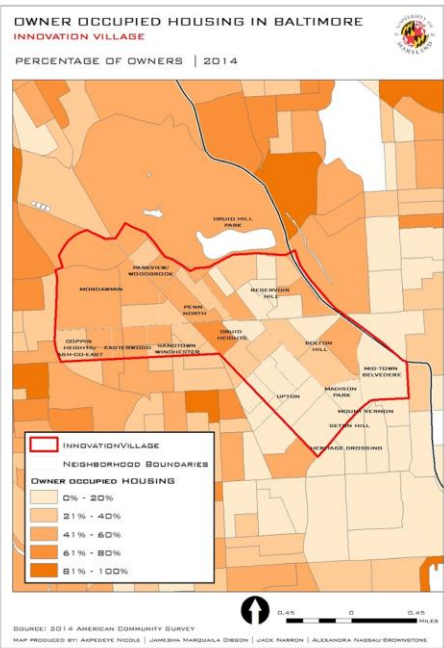
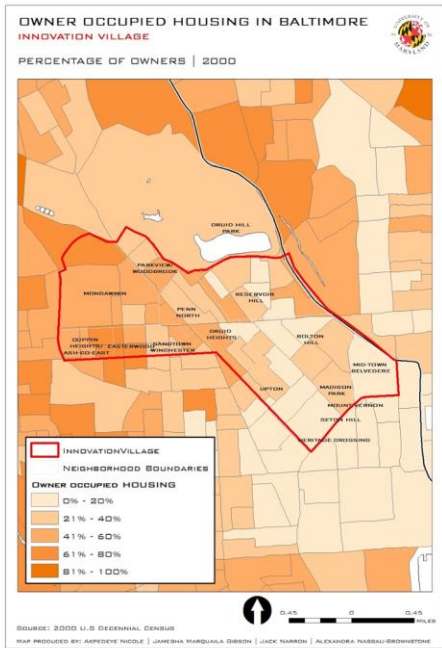
	2000 % of High School Diploma +	2014 % of High School Diploma +
Innovation village	63.8%	78.3%
City of Baltimore	68%	81%

	2000 % of Bachelor's Degree or higher	2014 % of Bachelor's Degree or higher
Innovation village	18.5%	28.2%
City of Baltimore	19%	26%

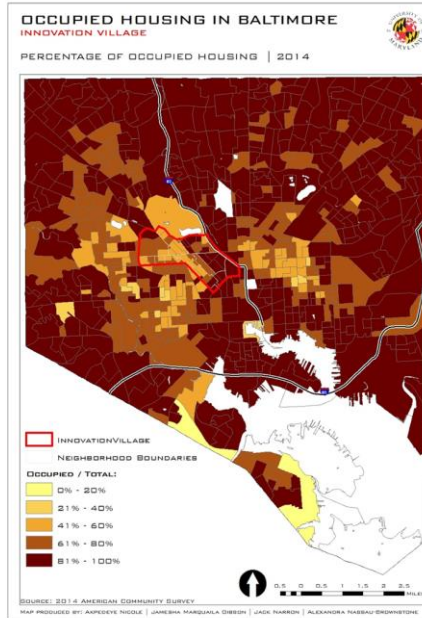
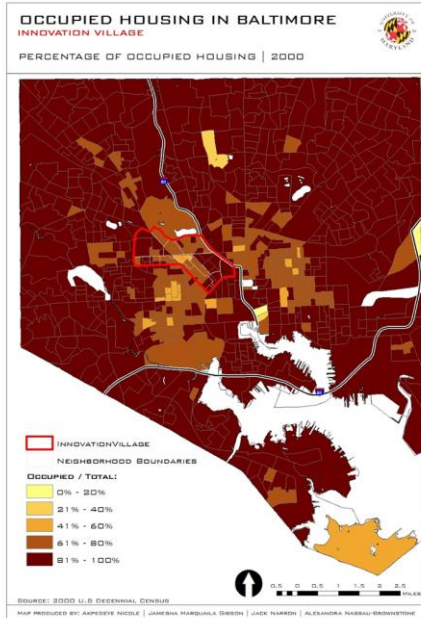
Housing Ownership: Owners vs. Renters



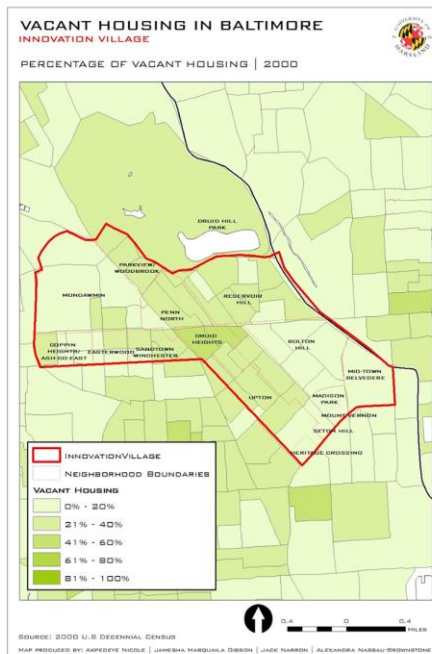
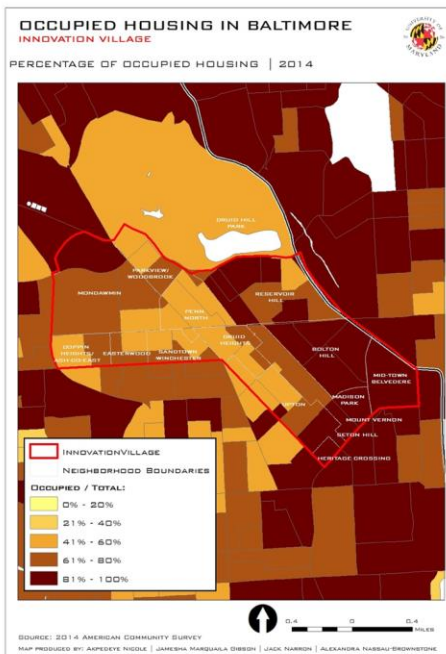
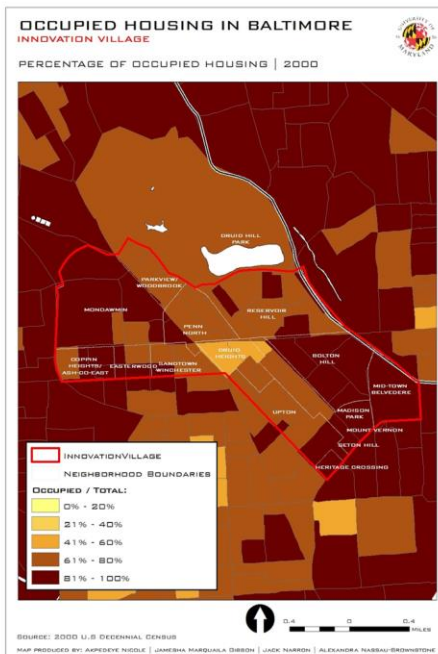
Housing Ownership: Owners vs. Renters



Housing Ownership: Occupied vs. Vacant



Housing Ownership: Occupied vs. Vacant



Housing Ownership: Takeaways

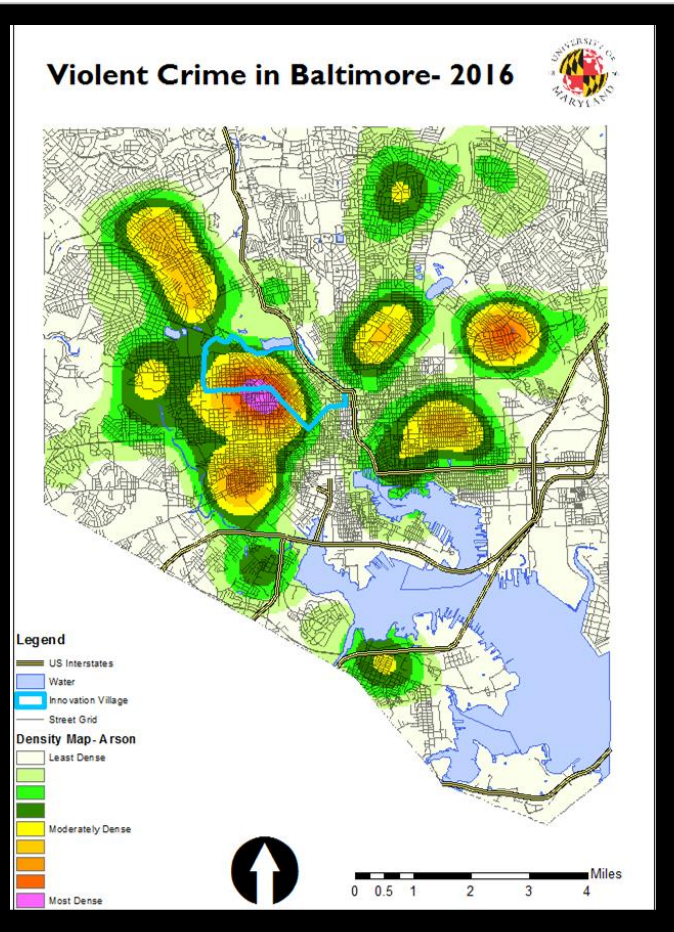
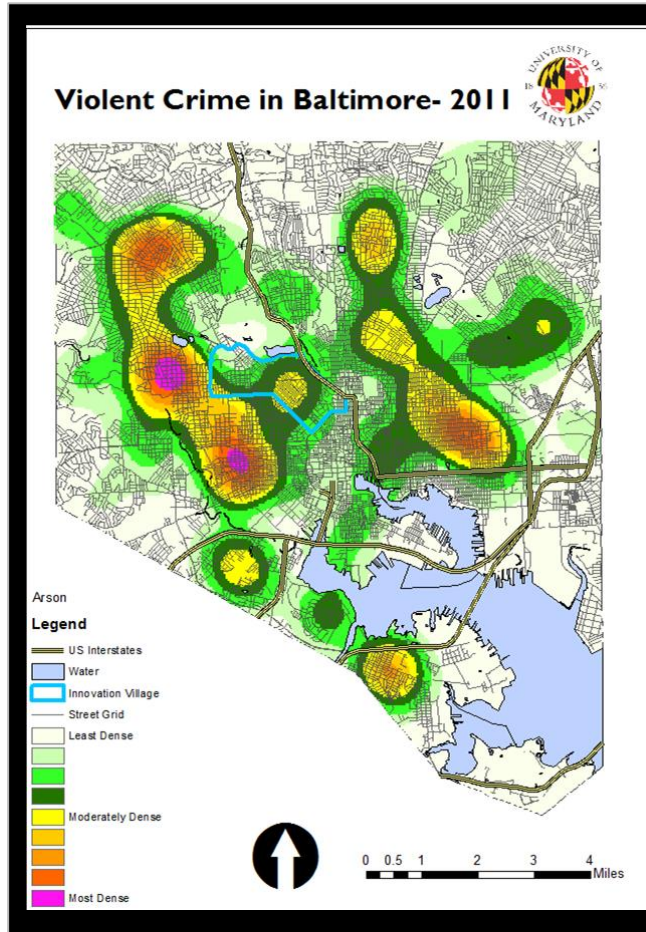
	2000 % of Owner Occupied Housing	2014 % of Owner Occupied Housing
Innovation village	28.4%	27.02%
City of Baltimore	50.3%	47.2%

	2000 % of Vacant Housing	2014 % of Vacant Housing
Innovation village	19.6%	25.8%
City of Baltimore	14%	18%

Crime

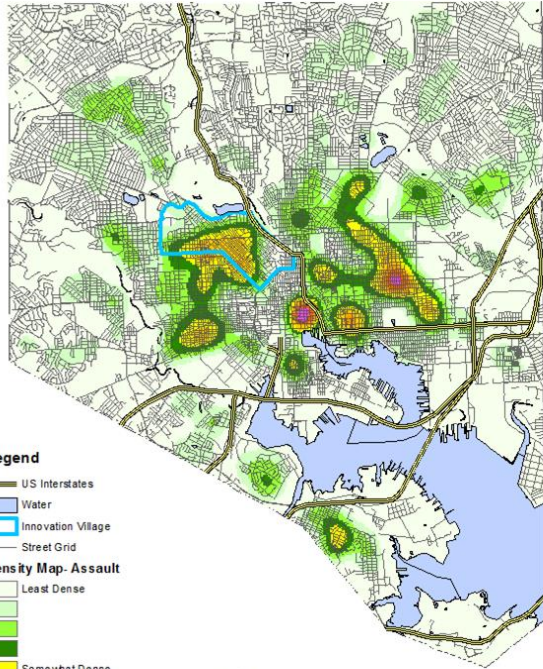


Arson



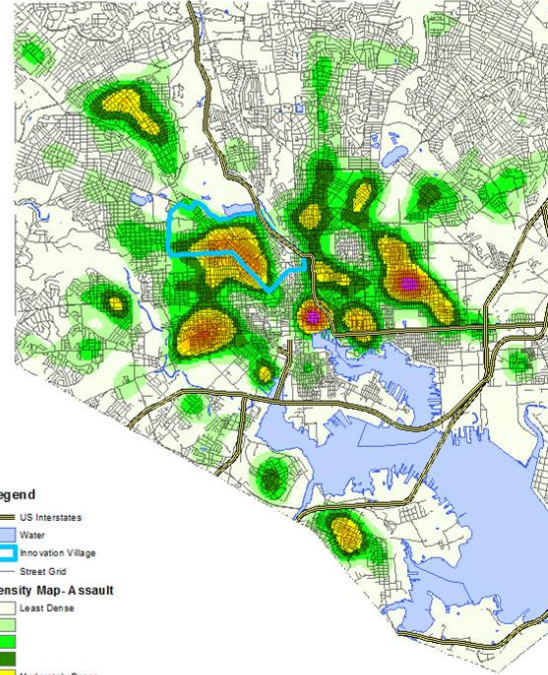
Assault

Violent Crime in Baltimore- 2011



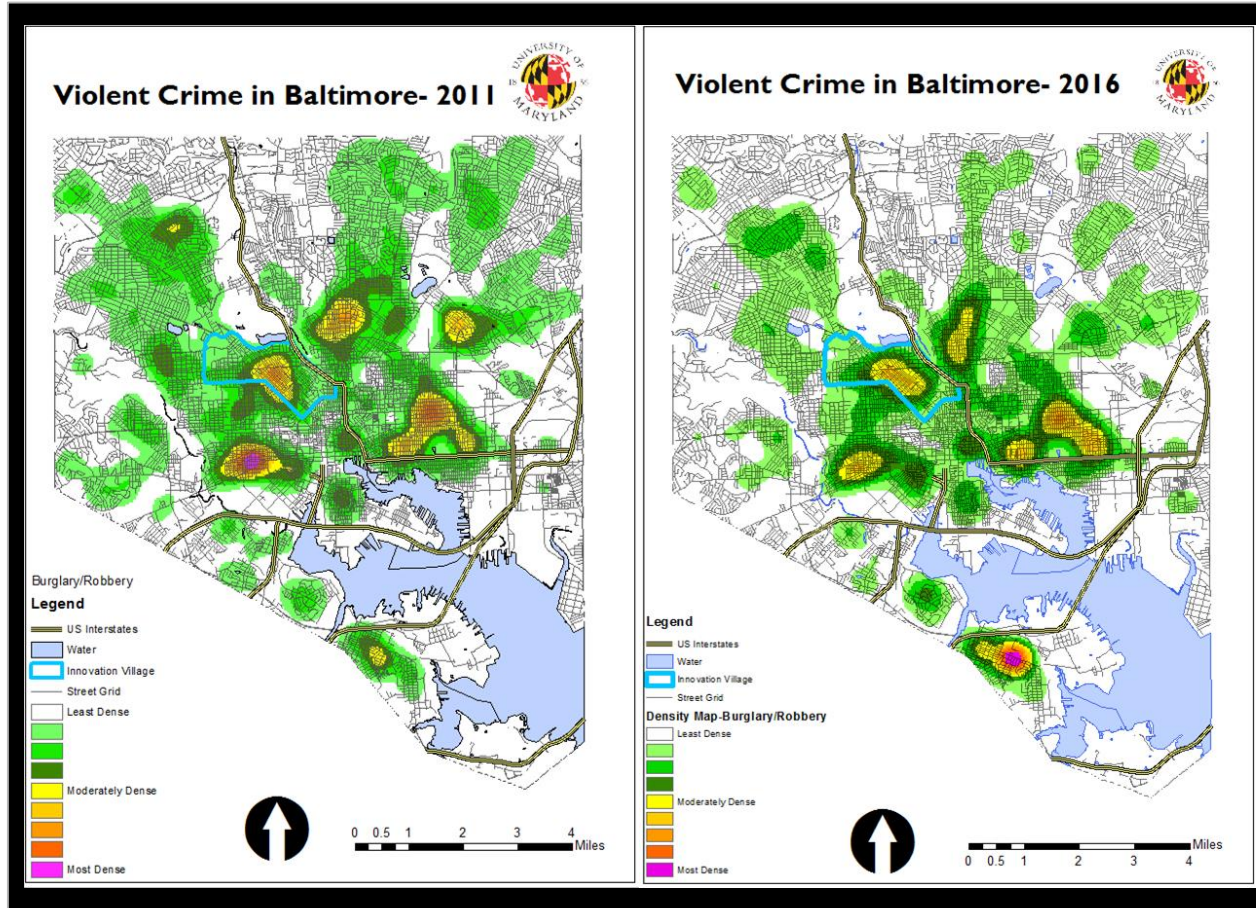
0 0.5 1 2 3 4 Miles

Violent Crime in Baltimore- 2016



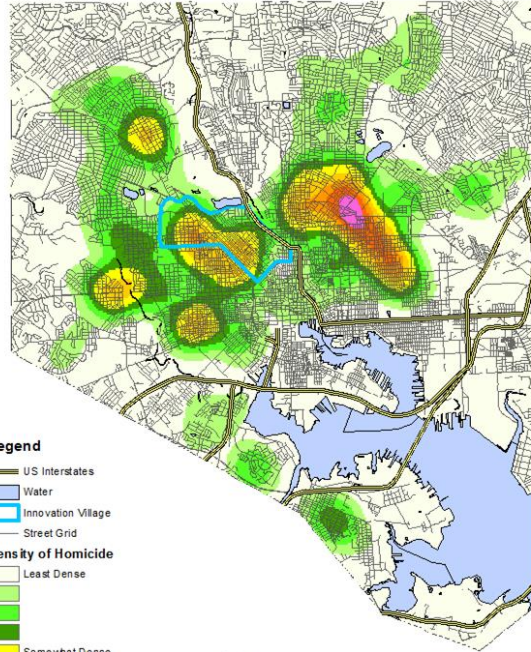
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Burglary & Robbery



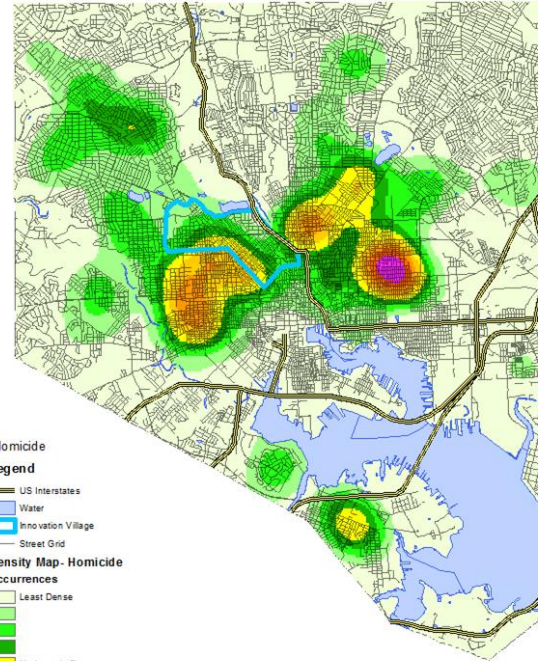
Homicide

Violent Crime in Baltimore- 2011



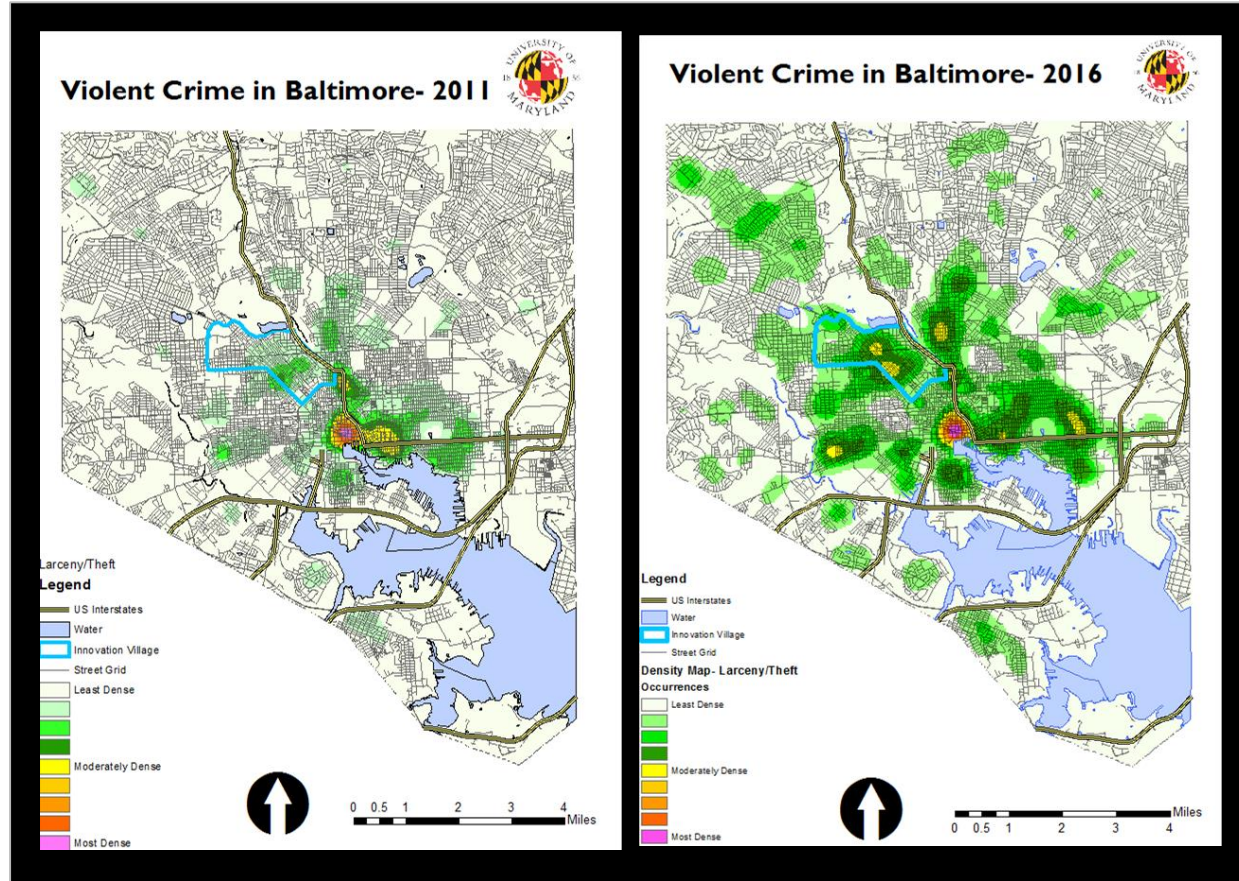
0 0.5 1 2 3 4 Miles

Violent Crime in Baltimore- 2016

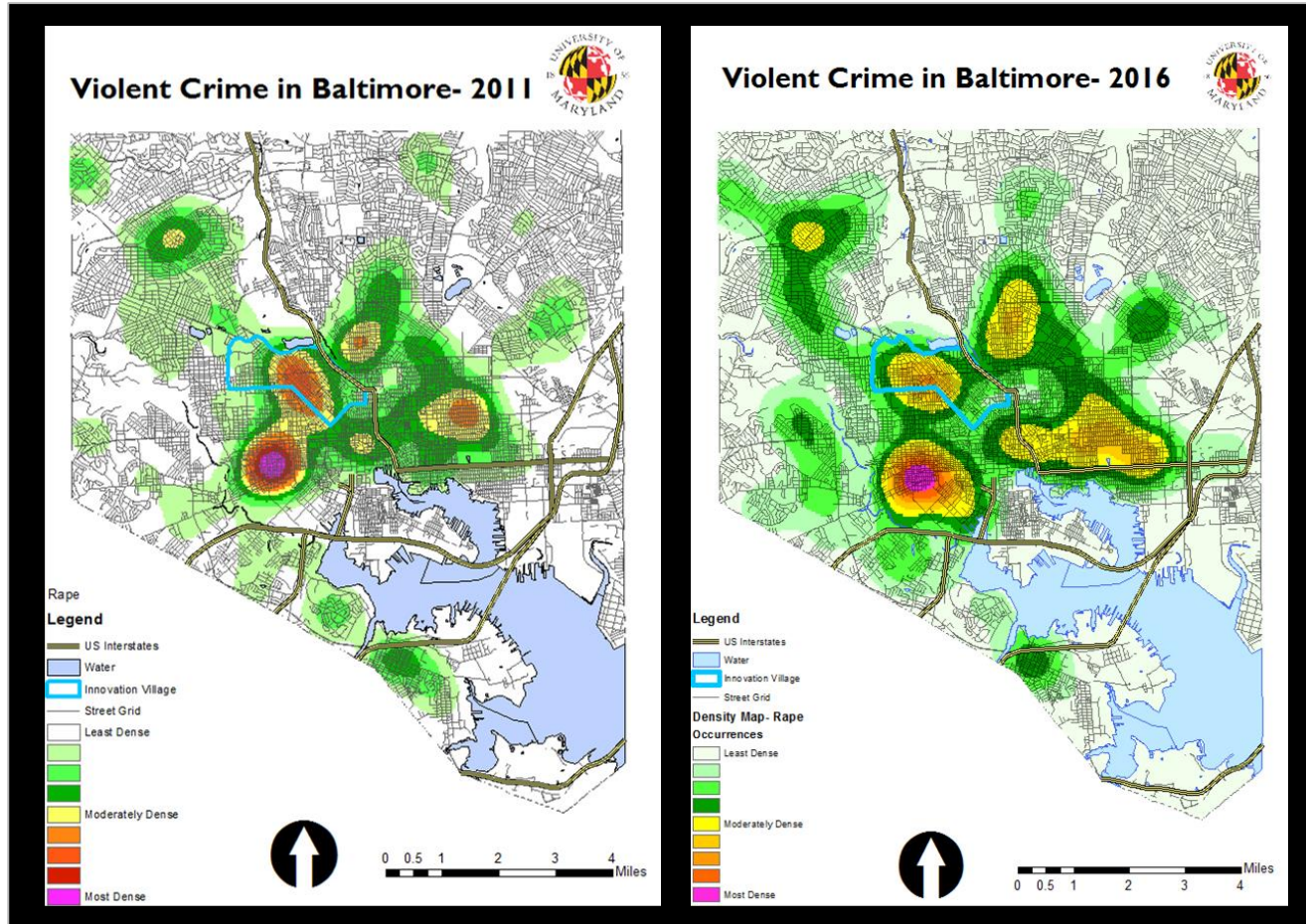


0 0.5 1 2 3 4 Miles

Larceny & Theft



Rape



Crime: Takeaways

Innovation Village has become more of a hot spot for:

Arson

Assault

Larceny/Theft

Innovation Village has become less of a hotspot for:

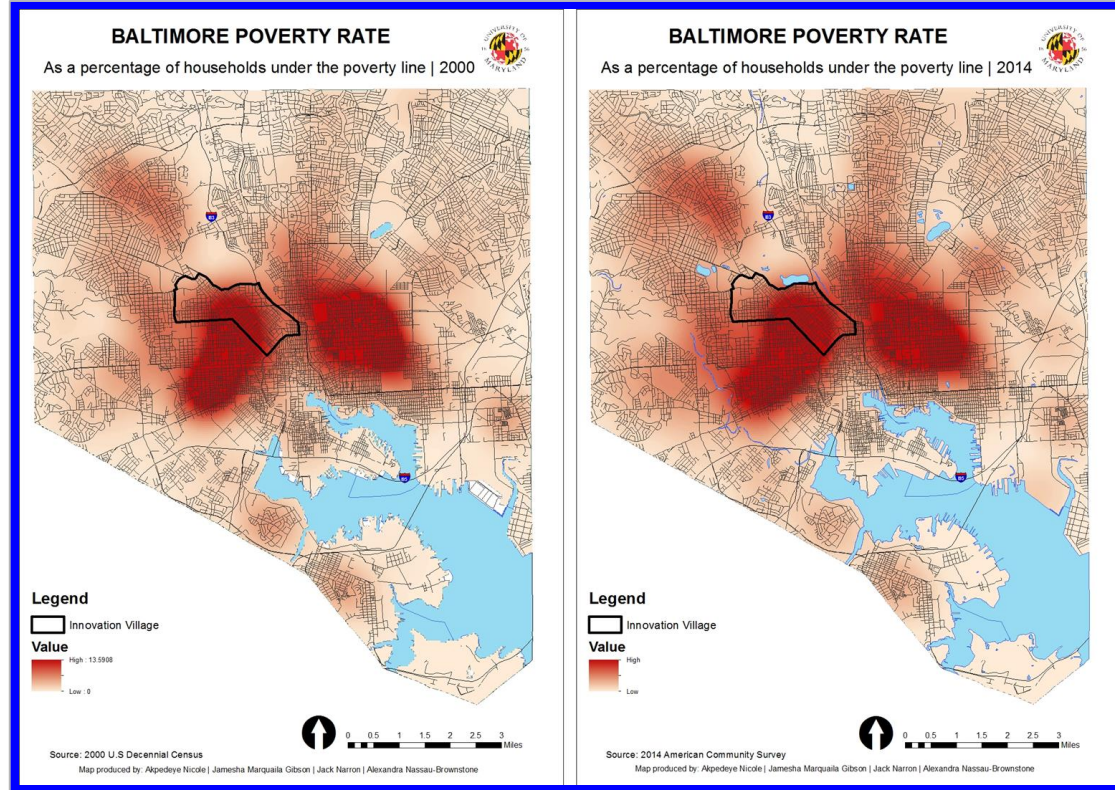
Homicide

Rape

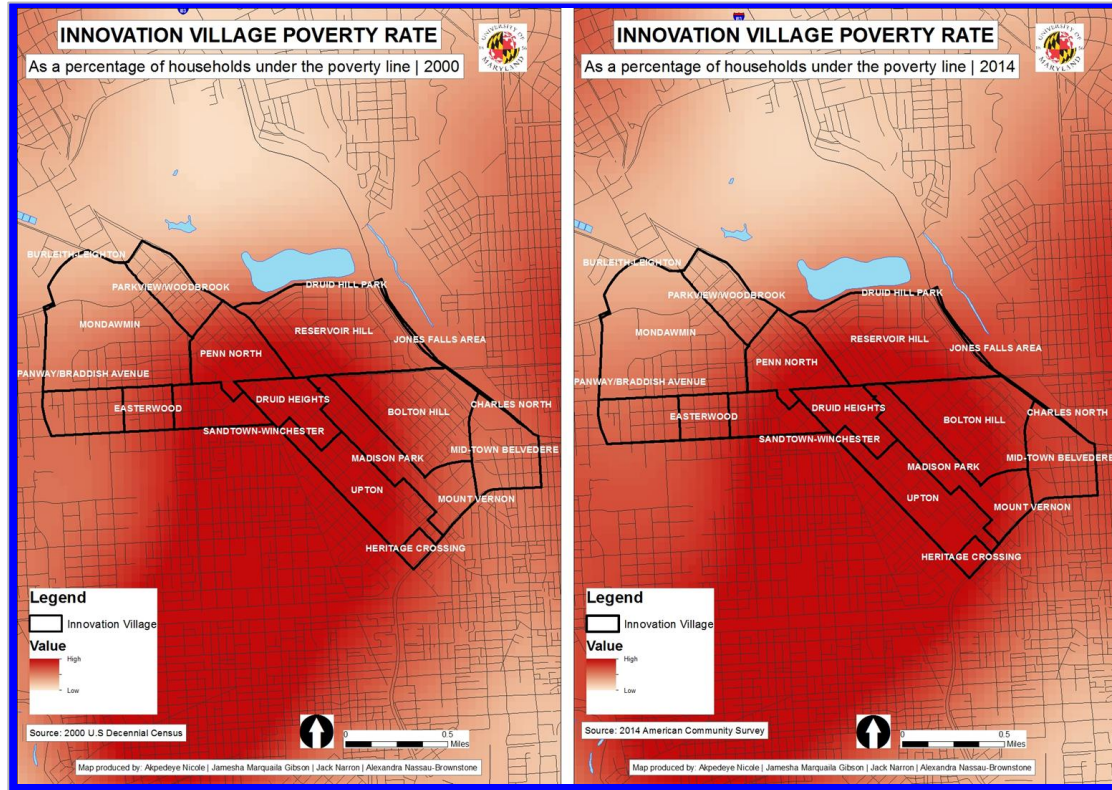
Innovation Village has remained roughly the same for:

Burglary/Robbery

Poverty



Poverty



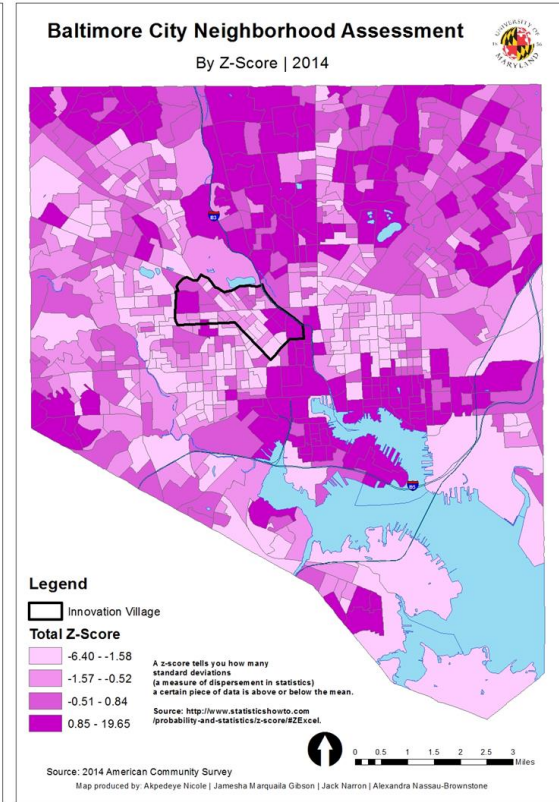
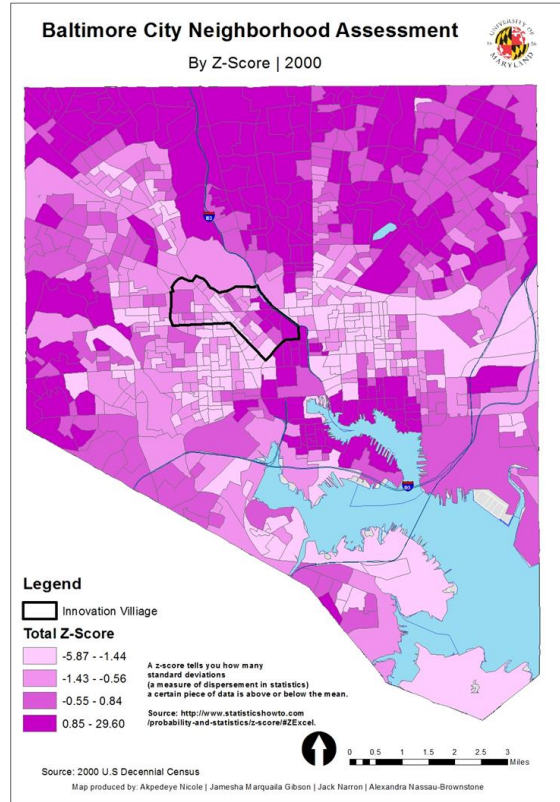
Poverty: Takeaways

Over 14 years, the poverty has increased and spread from the central neighborhoods to southern and western neighborhoods in the Innovation Village.

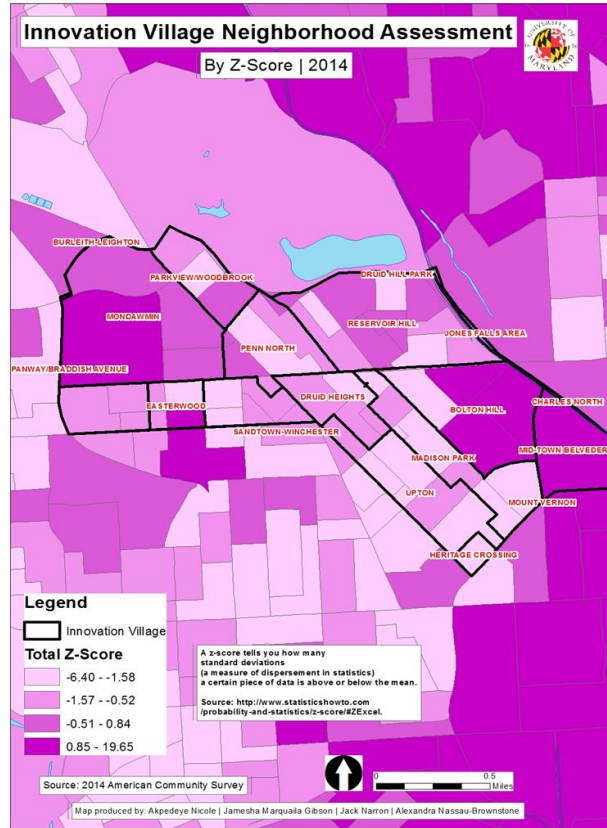
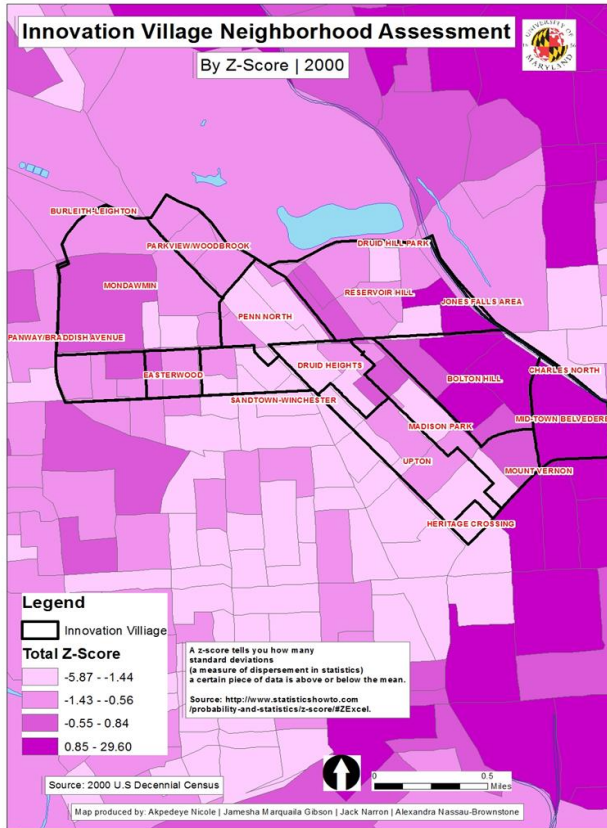
Note that the northeastern area of the Innovation Village does not have concentrations of poverty either in 2000 or 2014.

Poverty is concentrated in areas surrounding the Innovation Village, a possible indication of contributing trends within its boundaries.

Neighborhood Assessment Index



Neighborhood Assessment Index



Neighborhood Assessment Index: Takeaways

High Z-scores located in the Bolton Hill, Mid-Town Belvedere, and Mondawmin neighborhoods.

Z-scores for the Sandtown-Winchester, Penn North, and Druid Heights neighborhoods shifted from low in 2000, to moderate in 2014.

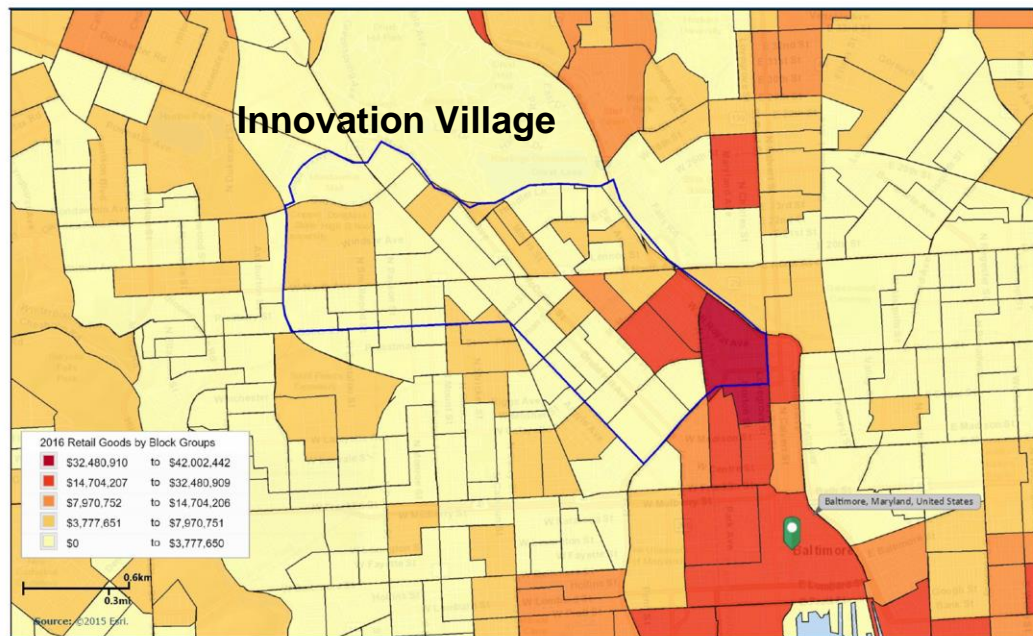
Larger trends in the areas around the Innovation Village may also impact neighborhoods within its boundaries.

Retail Spending



Custom Map

2016 Retail Goods by Block Groups



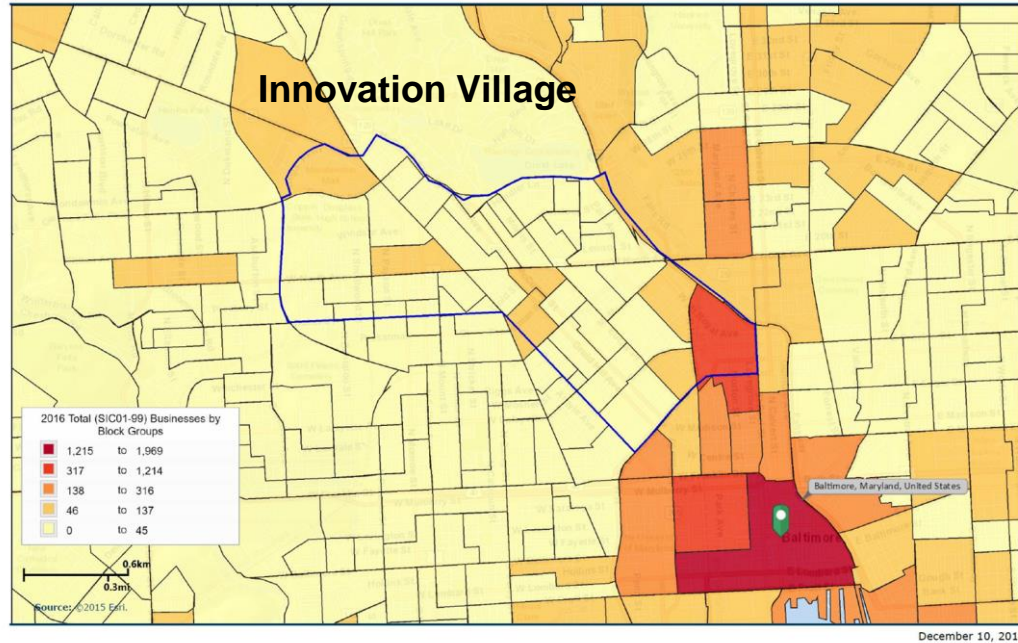
December 10, 2016

Businesses within Innovation Village



Custom Map

2016 Total (SIC01-99) Businesses by Block Groups



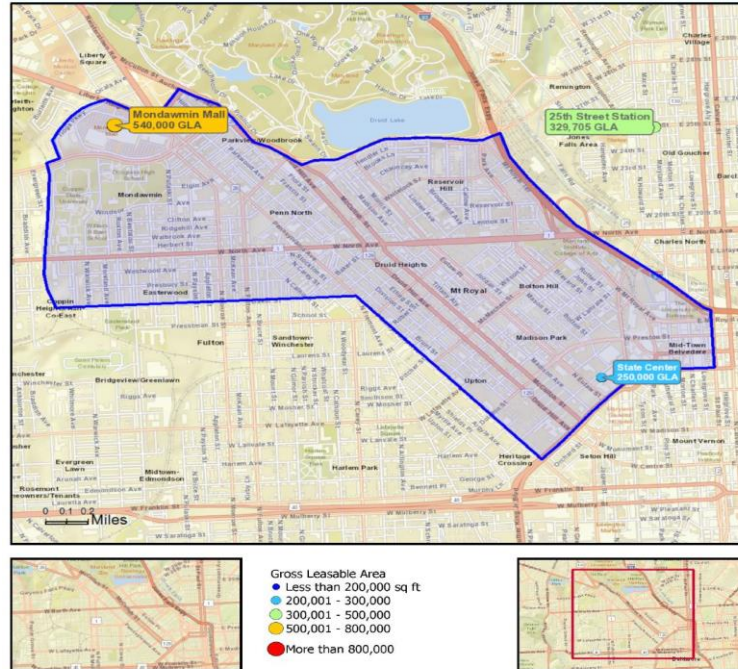
Major Shopping Centers



Major Shopping Center Map

Innovation
Area: 1.93 square miles

Prepared by Esri



Source: Directory of Major Malls, Inc.

December 10, 2016

Businesses within the Innovation Village



esri

Business Summary

Innovation
Area: 1.93 square miles

Prepared by Esri

Data for all businesses in area					
Total Businesses:				1,121	
Total Employees:				15,266	
Total Residential Population:				32,118	
Employee/Residential Population Ratio:				0.48:1	
by SIC Codes					
	Businesses		Employees		
	Number	Percent	Number	Percent	
Agriculture & Mining	2	0.2%	17	0.1%	
Construction	36	3.2%	298	2.0%	
Manufacturing	11	1.0%	126	0.8%	
Transportation	11	1.0%	138	0.9%	
Communication	16	1.4%	68	0.4%	
Utility	1	0.1%	400	2.6%	
Wholesale Trade	15	1.3%	163	1.1%	
Retail Trade Summary					
	285	25.4%	2,041	13.4%	
Home Improvement	4	0.4%	16	0.1%	
General Merchandise Stores	13	1.2%	271	1.8%	
Food Stores	55	4.9%	289	1.9%	
Auto Dealers, Gas Stations, Auto Aftermarket	16	1.4%	96	0.6%	
Apparel & Accessory Stores	34	3.0%	294	1.9%	
Furniture & Home Furnishings	13	1.2%	45	0.3%	
Eating & Drinking Places	92	8.2%	826	5.4%	
Miscellaneous Retail	57	5.1%	205	1.3%	
Finance, Insurance, Real Estate Summary					
	139	12.4%	545	3.6%	
Banks, Savings & Lending Institutions	58	5.2%	100	0.7%	
Securities Brokers	8	0.7%	45	0.3%	
Insurance Carriers & Agents	9	0.8%	43	0.3%	
Real Estate, Holding, Other Investment Offices	63	5.6%	358	2.3%	
Services Summary					
	485	43.3%	6,378	41.8%	
Hotels & Lodging	3	0.3%	16	0.1%	
Automotive Services	23	2.1%	139	0.9%	
Motion Pictures & Amusements	20	1.8%	311	2.0%	
Health Services	50	4.5%	793	5.2%	
Legal Services	21	1.9%	141	0.9%	
Education Institutions & Libraries	39	3.5%	2,137	14.0%	
Other Services	329	29.3%	2,843	18.6%	
Government					
	75	6.7%	4,998	32.7%	
Unclassified Establishments					
	46	4.1%	92	0.6%	
Totals					
	1,121	100.0%	15,266	100.0%	

Source: Copyright 2016 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2016.

Date Note: Data on the Business Summary report is calculated using Esri's Data allocation method which uses census block groups to allocate business summary data to custom areas.

December 10, 2016

Business & Spending Trends: Takeaways

More businesses focused on health, legal, and education services within the Innovation Village.

More opportunities for retail shopping throughout the Innovation Village.



Mondawmin Mall. Source: Scott Dance, "Mondawmin Mall Reopens, but not all stores recovered from looting," *Baltimore Sun*, May 3, 2015, <http://www.baltimoresun.com/news/maryland/baltimore-city/bs-md-ci-mondawmin-reopening-20150503-story.html>.



State Building, "The Plan," accessed December 12, 2016, <http://statecenter.org/theplan/>.

Recommendations & Ideas for Future Research

Western Innovation Village	Challenges	Opportunities
(Mondawmin, Coppin Heights, Easterwood)	<ul style="list-style-type: none">● Lowest educational attainment (within IV)● Increased crime rate 2011-2016 (arson, larceny rape)● Low level of retail spending, despite location of mall● Small number of local businesses	<ul style="list-style-type: none">● From 2000-2014, Increased % residents in workforce age group + millennials● Growing homeownership rates (but overall occupancy dropped)● Reduced Poverty Rate over time● Mondawmin Mall as retail anchor



Recommendations & Ideas for Future Research

Central Innovation Village	Challenges	Opportunities
(Penn North, Druid Heights, Sandtown, Midtown Edmondson)	<ul style="list-style-type: none">● Increased poverty rate (2000-2014)● High vacancy rates● Increased crime rates 2011-2016 (arson, assault, larceny, theft)● Low level of retail spending + local businesses	<ul style="list-style-type: none">● Growing level of high school educational attainment -- try to engage in higher level training or education● High Vacancy Rate-->opportunity for redevelopment



Recommendations & Ideas for Future Research

Eastern Innovation Village	Challenges	Opportunities
(Bolton Hill, Belvedere, Madison Park, Charles North, Mount Vernon)	<ul style="list-style-type: none">● Increased larceny and theft (2011-2016)● Significantly more renters than homeowners	<ul style="list-style-type: none">● High % of residents in workforce age group● Highest educational attainment within IV● High occupancy rate (mostly renters)● Reduced overall crime rate over time● Highest retail spending and # of businesses



Thank You!

